

**McLoughlin House Unit
Fort Vancouver National Historic Site
Museum Management Planning Team**

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McLoughlin House Unit
Fort Vancouver National Historic Site
Museum Management Plan

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Executive Summary

This Museum Management Plan for the operation of the McLoughlin House Unit (MCHO) of Fort Vancouver National Historic Site (FOVA) identifies the issues facing the unit, and presents recommendations to address them. A team of collections management professionals developed this plan in full cooperation with the staff responsible for managing the unit.

The team creating this plan recognizes the over 90 years of dedicated management and preservation of this site and related collections by the McLoughlin House Memorial Association and its precedents. The unit collections are now in a developmental phase within the National Park Service (NPS) system, which applies different criteria for collections management and resource preservation as defined by NPS standards and required by public law. The collections require different storage and work area conditions, and selective consolidation of these resources per the recommendations of the NPS Curatorial Facility Strategy approved in 2006. Life safety, environmental monitoring, integrated pest management, and resource preservation are primary concerns that need to be addressed by an aggressive collections preventive maintenance program at this unit. All archival holdings require systematic evaluation, processing, and documentation. Adequate funding and staffing to reach NPS standards and accomplish NPS objectives are also major concerns addressed in this plan.

This Museum Management Plan offers recommendations for the actions necessary to take the park archives and museum collections through this developmental phase, and to provide critical services for these park specific resources.

Key Recommendations

The key recommendations are listed here, while more detailed action recommendations follow each issue section of the plan.

- Fully document the resources of the site to NPS standards.
- Implement conservation and preservation required for resource preservation.
- Develop life safety and security systems and protocols necessary to ensure the protection of the staff and visiting public and to preserve the resources.
- Plan and implement innovative and proactive programs and patterns of resource use that encourage public use of the resources while ensuring long term preservation.
- Establish the necessary preservation programs supported by the funding and staffing required to assure resource preservation to NPS standards.

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Introduction

The Museum Management Plan (MMP) replaces the Collections Management Plan (CMP) referred to in the National Park Service publications *Outline for Planning Requirements* and *Cultural Resource Management Guidelines* and the *NPS Museum Handbook*. The CMP concentrated on the technical aspects of museum operations including a review of accession files, status of cataloging, adherence to guidelines, and resulted in detailed recommendations for corrections and improvements. As an approach to museum management planning, the MMP evaluates all aspects of museum-related programs within a park, and makes broad recommendations to guide development of park-specific programs that respond to the identified needs of the park.

The MMP recognizes that specific directions for the technical aspects of archival and collections management exist within the *NPS Museum Handbook* series; thus no attempt is made to duplicate that type of information in this plan. Instead, the MMP places museum operations in a more holistic context within park operations by focusing on how various collections may be used by park staff to support the mission goals of a particular park. This approach recognizes that there are many different ways that archives and museum collections may be organized, linked, and used within individual parks, and it provides park-specific advice on how this may be accomplished. Where required, technical recommendations not covered in the *NPS Museum Handbook* will appear as appendices to this plan.

The benefits, or outcomes, of an organized and administered archives and museum collections management program are often not well understood by parks. For that reason the potentials inherent in a well-developed program are often overlooked and under-supported. Stated in the most basic terms, the museum management program should be designed to

collect and preserve park specific data, and make that information available to park staff and the public in the most efficient manner possible.

Considered in this light, it is easier to understand how different types of resources in collections might be administered in different ways, depending upon the local needs for documentation, preservation, and use. This need for a unique, park-specific approach to the management of these resources is what the MMP process provides.

Although Fort Vancouver National Historic Site has been in existence since 1948 under various designations, the McLoughlin House site was designated a national historic site in 1941. This historic house was preserved and managed by the McLoughlin Museum Association (MMA) from 1909 until 2003 when the McLoughlin House unit, including the McLoughlin and Barclay houses, were added as a unit of FOVA.

The park has an existing Museum Management Plan, but it was written in 1998 and is due for a revision; the McLoughlin House site has had almost no museum planning, so this document represents the beginning of National Park Service planning for the site. Over the next several years additional documents will be completed, including historic structures reports, an historic furnishing report, and a cultural landscape report. These documents will assist the park in carrying on the preservation work started almost 100 years ago by the MMA.

Under a contract with a museum consultant, this Museum Management Plan was developed over an 11-day period from September 4 through 14, 2007. The team became familiar with resources and operations of the McLoughlin House site in Oregon City. Team members then developed, organized, and recorded the central issues and the necessary supporting information that comprises the plan.

This plan is the result of team and park collaboration, including discussion and consensus, regarding all issues and recommendations. Appendix A provides a useful tool for the park to evaluate the operational needs of the site; it is taken from a body of suggested methodologies and reference materials generated over time by various NPS curators for other planning

documents. The McLoughlin House site was only recently added to FOVA so it has not had the benefit of museum planning. This plan was completed as a team effort after numerous discussions with park staff; however, the individual issues were crafted by individual team members. The authors by issue are:

History of Museum Collections — Theresa Langford

Issue A — H. Dale Durham

Issue B — Kent Bush

Issue C — Steve Floray

Issue D — H. Dale Durham

Issue E — Kent Bush

The team wishes to thank the staff of the McLoughlin House site and Fort Vancouver National Historic Site for the courtesy, consideration, and cooperation extended during this planning effort. In particular, Chief of Interpretation Greg Shine and Park Guide John Salisbury provided valuable information and insight into the McLoughlin House, the MMA, and site programs. The time, effort, and involvement of all these people have been very much appreciated, and have served to make our job much easier. It is apparent that these individuals are dedicated and committed to the preservation of the park resources, and it is a pleasure to work with such professionals.



Figure 1 Master bedroom, McLoughlin House



Figure 2 Dining room, McLoughlin House

History of the McLoughlin House Collection

When John McLoughlin retired from the Hudson's Bay Company in 1846, he and his family moved into this home in Oregon City, Oregon. The two-story Colonial style dwelling was originally located at the south end of the town, on the lowlands near Willamette Falls. During his tenure here, McLoughlin became an American citizen, served in public office, and actively supported the business and civic life of Oregon City.

After the death of Dr. and Mrs. McLoughlin, the house was sold by their heirs in 1867. By then encompassed by an industrial area, it was reused as a hotel and for other various enterprises. In 1908, the owner decided to demolish the house and use the land for other purposes. Community support for salvaging the house was widespread and culminated in the formation of the McLoughlin Memorial Association (MMA) in 1909, making it one of the earliest historic preservation movements in the west.

In a strenuous move, the MMA resituated the house on a bluff overlooking Oregon City, in a charter park that McLoughlin had originally donated to the town. The house languished for several decades, but with the assistance of several other historically-minded groups, the MMA renovated and reopened the house as a museum in the 1930s. The museum not only showcase McLoughlin's significant role in regional history but also the dedication and perseverance of the site's caretakers.

The site also includes the Barclay House, inhabited from 1850-1873 by Forbes Barclay and his family. Barclay had been the physician at Fort Vancouver while McLoughlin was Chief Factor, and the men moved south within a few years of each other. The Barclay House was also moved to the bluff in 1937 after having been salvaged from the older part of the town near the Falls.

Congress designated the McLoughlin House site as a national historic site in 1941, making it the seventh in the nation and the first west of the Rocky Mountains. That same year, the Department of the Interior entered into an agreement with the MMA regarding operation of the home. Though no formal action designating the McLoughlin House as an affiliated area of the National Park System has been found, the National Park Service has considered it as such because of the 1941 designation and agreement. The Portland, Oregon office of the National Park Service was responsible for assisting the MMA in their preservation efforts during this time.

When Fort Vancouver National Monument was redesignated Fort Vancouver National Historic Site in 1961, the park took over the responsibility for supporting the MMA from the Portland office. With an inconsistent relationship between the two partners over the next four decades, the MMA struggled to maintain the site with little funding. In 2000, during public meetings for an update of the park's General Management Plan, representatives of the MMA approached the superintendent to suggest strengthening the relationship between the two sites in some way. With a renewed, and more cooperative, relationship between Fort Vancouver National Historic Site and the McLoughlin Memorial Association, the MMA decided to push for full inclusion in the National Park System, and the Oregon Congressional delegation sponsored legislation to add the site to the boundaries of Fort Vancouver.

On July 29, 2003 President Bush signed Public Law 108-63, adding the McLoughlin House unit to Fort Vancouver National Historic Site. The National Park Service purchased the McLoughlin and Barclay Houses from the McLoughlin Memorial Association and took over management. The MMA is now reinventing itself as a vital support organization, continuing its commitment to the site that began almost a century ago.

The museum collection was donated to the park by the MMA. An additional 110 items, mainly letters and photographs kept off-site, had previously been purchased by the National Park Service. The collection consists of approximately 850 objects, including furnishings, decorative items, clothing and other personal articles, and ephemera. Some of the objects belonged to the McLoughlin or Barclay families—or were

associated with notable fur trading families—though the majority of collection objects are furnishings that have no historical tie to the site but are of the historical period 1846-1867. Other objects are outside the scope of the collection: historic items that pre- or post-date the period of significance; are associated with other pioneer families but have no relation to the site; or are completely inappropriate for the site.

The MMA generally received the collection items as donations from local individuals. A notable exception is a group of furnishings and books purchased at the estate auction of William Fraser Tolmie. The documentation on donors, possible restrictions, and other accession information is slim, though some data exists on early (ca. 1960) catalog cards. Much of the information about the museum collection depends on oral histories from MMA and community members. The MMA assigned each individual object a catalog number with an alpha code related to the type of object. For example, IN would prefix an item of “Indian” origin, or P would prefix a photograph. Catalog records do exist for most items, but the data is perfunctory.

Just prior to and since the National Park Service acceptance of the collection, several actions of note have occurred. An appraisal of the majority of the collection was done in 2002. Since that time, further research has shown that the identifications and valuations in that report are not reliable. The Native American items have since been reappraised; a new appraisal on the textiles is in progress. In consultation with the Chief Curator of the National Park Service, it was decided that the McLoughlin House collection would receive a Fort Vancouver (FOVA) accession number and FOVA catalog numbers. It will not be a separate collection, but incorporated and managed identically to those assemblages already in the Fort Vancouver collection. Cataloging of the entire collection to National Park Service standards is underway.



Figure 3 Ivory sewing accessories in lacquered sewing cabinet, McLoughlin House



Figure 4 McLoughlin House living room

Collections Management Philosophy

The basic principles for managing museum collections in national parks are not always well understood. Park managers, resource managers, and interpreters are often too busy with their specialties and daily work to fully consider the concepts and logistics governing collections management. It is easy for parks to fall short of developing a sound museum management program and, as a result, not realize the full benefit and value possible from their collections.

This section provides the following background information about museum collections:

- The purpose of museum collections
- How museum collections represent park resources
- Determining where to locate museum collections
- Establishing access, use, and management policies for collections
- Professionalism in collections management

Purpose of Museum Collections Within National Park Units

Museum collections always contain objects and specimens, and most parks administer their own archives and operate their own libraries. These functions are necessary to support the work of the organization as a whole. It is not unusual for these resources—archives, collections, and libraries—also to be accessible to the public.

Within national parks, museum collections (including archives) serve four basic functions:

- **Documentation of resources** – Park collections should serve as documentation of the physical resources of the park as well as the history of park efforts to preserve and protect those resources.

- **Physical preservation and protection of resources** – Park collections should help preserve and protect park resources, not only by keeping the specimens and collections made to document the resources, but also by preserving the information about the individual items and the resource as a whole. This is central to the management of both natural and cultural material.
- **Research** – During documentation of collections, a park performs research to provide the background information used in cataloging. The park is also responsible for making this information available to legitimate research, which can itself lead to new discoveries about an individual item, or the park as a whole.
- **Public programs** – The park is responsible for using its collections to provide information to the public. Exhibits, publications, and interpretive programs are traditional means of supplying public information, but new technology has led to other communication methods, including electronic access through web sites and on-line databases.

How Collections Represent A Park's Resources

A park's museum, library, and archival collections provide different perspectives on its resources:

- Museum collections, which contain three-dimensional objects and specimens, should represent the resources within the park boundaries. Examples of museum collections include: artifacts from archeological activities; specimens and resulting reports from resource management projects; paint samples and building fragments from restoration of historic structures.
- The park archives should contain files, manuscripts, personal papers, maps, building plans, and photos that document the history of park development and the management of park resources. Individual collections within the archives should further document the activities that created portions of the museum collections. Examples of park archives include: copies of field journals and maps created while collecting botanical specimens; photographs taken during historic structure work; maps and as-built drawings made during utility installation; and property, land, and water use agreements that document past acquisition and use of park lands.

- The park library should contain both published literature and less formal reports and documents relating to park resources and their management. Examples might include: general literature concerning local history, flora, and fauna; specialized scientific studies relative to biota and archeological resources found in the park; circulating copies of all park specific planning documents; and trade, craft, and professional journals to fulfill the need for park staff to remain current in their field.

Determining Where to Locate Park Collections

The *NPS Museum Handbook* should be used as a guideline for identifying locations of branch or satellite park collections, and establishing methodologies for their documentation, organization, storage, and use.

Centrally located collections are often most effective since they promote efficient use of space (particularly in terms of combining preparation and work areas). However, it may also be efficient operationally to split the collections among potential users (for example, the herbarium and insect collection going to separate branches for storage and use).

Branch or satellite collections are possible as long as proper preservation and security conditions are met, and the requisite work areas necessary for management and use are provided. Overall responsibility for documentation, preservation, and reporting should, however, remain vested in one curatorial lead position, no matter where branch collections are located.

Establishing Access, Use, and Management Policies

Access, use, and management policies define who can access the collections (both staff and public); what types of use are possible and under what conditions; and how the collections should be managed. Desired outcomes or products should be identified as well; for example, the types of services that are desired by staff from the collections manager. Some examples might include production of over-lays of buried utilities; production of CDs containing research done at the park; liberal access to botanical specimens for comparative studies; and inter-library loan

services. Samples of access, use, and management policies may be obtained from the lead curator.

The park may wish to consider the use of focus group exercises to develop a number of park-specific documents, including a Role and Function Statement, for the combined collections. These would clearly state who is responsible for the development of a joint resource and how it will function to serve park-wide goals. Access and use policies should be defined and implemented. Responsibilities for development, documentation, and management of the resources should be defined in a formal position description and associated performance standards. These objectives must be fully defined in writing if they are to be accomplished in fact.

Professionalism

The management of archival, museum, and library collections requires the application of three different, but related, management philosophies and technological approaches. These disciplines each have two components: technical and professional. It is possible to be proficient in either one of these components without being functional in the other.

The primary difference between the technical and the philosophical lies not only in understanding how to apply the technology, but in being able to determine when, why, and which technologies need to be applied in any given situation. This distinction and ability can be called “professionalism,” and it can be an illusive, difficult thing to define—probably because most practitioners of the curatorial craft possess varying degrees of facility with both the technological and the philosophical aspects of the work.

Professionalism does need to be practiced and exercised to develop properly. It is better fostered by mentoring, particularly in the early stages, for professionalism is difficult to develop in isolation. It takes fairly direct and frequent association with a range of others working in the craft, so that the developing professional personality has a healthy range of philosophy,

opinion, and action to model. Professionalism also needs to be maintained in much the same manner.

The management of park archives was added to park curatorial portfolios in the mid 1980s, and increasingly, most park curators also manage the individual park library program. This accretion of complex duties has to some extent resulted from the overall loss of permanent positions service-wide, and particularly within the parks. These factors are not likely to improve in the foreseeable future, so park management must ensure that each position is filled with the best qualified candidate available.

Park managers having a professional on staff providing required curator-of-record services for other parks need to be aware that this service constitutes an accretion of duties. The factor of just and adequate compensation for services needs to be discussed and resolved on a park-to-park, and park-to-professional staff basis. Park managers should also realize that curator-of-record duties may cause a reduction in services to the providing park that could be resolved by part-time technical help.

Recommendations

- Create a focus group of senior staff representing all park divisions and branches to define what the collections should contain, how they should be managed and accessed most efficiently, and what products should be produced upon request.
- Define the role and function of the combined collections by formal statement, formal access policies, and formal methodologies for depositing collections material, archival information, and required literature into the collections.
- Assign responsibility for developing and managing the joint collections to a single administrative unit and individual with a written position description and performance standards.
- Identify possible cooperative partnerships within the park network and in the community with individuals and groups that hold common interests regarding the preservation and management of park resources.



Figure 5 Upstairs hall sofa, McLoughlin House

Issue A— Documentation

Issue Statement

Professional level documentation of archival and museum collections is required to fill both public and park operational needs for quality information and accountability.

Background

The McLoughlin Memorial Association (MMA) was established in 1909 to preserve and interpret the McLoughlin House as a museum. The Association acquired historic furnishings and other historic objects for the site. Documentation of the museum collection was accomplished through the use of a catalog system using their own designations and marking techniques. In 2003, the McLoughlin House and the Barclay House were added to FOVA as a unit.

The museum collection was donated to the park by the MMA. The collection consists of approximately 850 objects, including furnishings, decorative items, clothing and other personal articles, and ephemera. An additional 110 items, largely composed of archival documents, were previously purchased by the National Park Service.

The site's collections were appraised in 2002, just prior to their being donated to the Service. While this appraisal provided a working basis for evaluating the collections at that time, it is incomplete and inadequate in a number of key aspects. A new appraisal in acceptable format and detail needs to be done in the near future. It would support the Historic Furnishings Report efforts as well as the on-going collection documentation and catalog work done by park staff.

The Association has a large archival collection of approximately 100,000 records. The collection was surveyed in 2006 by an NPS archivist, but still requires archival processing. As this archival collection represents the

Association's operations since inception, the assumption is that significant information is contained in these documents that may address structural preservation questions as well as provide provenance and acquisition information for many museum objects.

Discussion

Federal Law and National Park Service Management Policies require that all museum collections be properly documented, preserved, and accounted for. Proper documentation establishes federal ownership and custody of museum objects. Thorough documentation of collections facilitates physical and intellectual access to museum collections for purposes of collections management, research, interpretation, exhibit, and loan.

The accession process begins with the entry of objects into the collection, whether these items are generated from field collections, donations, loans, or transfers of property. The accession records identify legal ownership or custody and provide essential information about the objects. Acquisitions are recorded in the park accession book and accession file. These records constitute legal documentation of the park's authority to hold and use the collections. Accession receiving reports, legal custody documents, and all other permanent records associated with the accession should be filed in an accession file and maintained in a protected environment.

Cataloging each object is the second step in the documentation process. Catalog records also document and provide accountability for the museum objects and specimens. They record physical attributes of the objects and information pertaining to their accession, condition, storage location, and provenance. This information is entered into the Automated National Catalog System (ANCS+) and is submitted annually to the National Catalog. An annual inventory of collections is required to provide accountability and help ensure against losses.

Completion of the Collection Management Report (CMR) provides valuable information on the status and types of collections at the site and the number of cataloged and uncataloged collection items. Incomplete or out-of-date supplemental information on the CMR provides an incorrect

picture of collection activities. The information on the CMR completed by parks is used to determine both the percentages of Backlog Cataloging funds received by the region, and the eligibility of an individual park to receive these funds. Accuracy in completion of this report is extremely important.

Detailed guidance for accessioning and cataloguing the museum collection may be found in the *NPS Museum Handbook*, Part II: Museum Records, and in the Automated National Catalog System *User Manual*.

Shortly after the McLoughlin site became a unit of the park, a decision was made to catalog the site collection into the park's master museum catalog. Only a small percentage of the site museum collection is presently cataloged to NPS standards. Funding is programmed to support completion of this cataloging effort.

As the site's museum collection is cataloged, the Association's catalog information will be transferred to the ANCS+ database. All relevant information from the Association's catalog records will be retained. Information contained in the initial appraisal of the donated 850 objects is incomplete and lacking in both required format and detail. Additional appraisals have been conducted on other elements of the collection, but the entire collection should be reappraised to the standard outlined in the *NPS Museum Handbook*, Chapter 4, pages 4.45 to 4.50.

The MMA archives may contain essential information to support the programmed Historic Structures Report and Historic Furnishings Report. As the original managers of both the McLoughlin and Barclay Houses, the Association created archives which contain invaluable data regarding maintenance and management of the site as well as information about acquisition and provenance of the historic objects. It is important that this archive be professionally processed in the near future to support other activities.

The MMA membership has a host of information about the site and the activities of the Association over the years. To preserve this information, an oral history program should be implemented as soon as possible with

the Association members. Oral history should also be conducted with members of both the McLoughlin and Barclay families as well.

The FOVA Scope of Collection Statement (SOCS) should be revised to include the McLoughlin House and Barclay House collections. To ensure that the site is adequately addressed, a separate section of the SOCS should be included to capture the essential elements and themes of the site's story.

Recommendations

- Continue to catalog the site's museum collection.
- Obtain new appraisals for the site's museum collection.
- Revise the park's SOCS to include the site in a separate section.
- Arrange for the loan of the Association's archival document collection.
- Process the Association's archival document collection to professional standards.
- Implement an oral history program to interview Association members and McLoughlin and Barclay family members.

Issue B—

Collections Conservation and Preservation

Issue Statement

A strong museum conservation and preservation program is essential to ensure the integrity and survival of collections and archives for future use.

Background

The McLoughlin Memorial Association (MMA) was founded for the purpose of saving the McLoughlin home and presenting the history of the family to the public. In addition, the mission of the MMA was expanded to include the Barclay House. Presumably, the MMA began collecting materials to accomplish this mission shortly after the organization was founded.

The current collections consist of about 850 items; about 150 fall into the archival category and the remainder are mostly house furnishings. An additional archival resource composed of McLoughlin Memorial Association records is currently stored on-site. Documentation of these resources is covered in another section of this plan.

Collections conservation and preservation have been ongoing concerns of the McLoughlin Memorial Association. Indications show that MMA staff and volunteers recognized the basics of collections preservation and worked within their existing budget to provide what was possible. This included intrusion and fire alarms with associated fire suppression system, UV film on the house windows, and the beginnings of a pest management program.

The fact that the collections have survived in relatively good condition over the history of McLoughlin Memorial Association management is

testament to the dedication this organization and its members have shown over the past 88 years.

Discussion

The development of a well-founded collections conservation and preservation program begins with gathering the basic data necessary for the curator to make informed decisions. These data result from monitoring the temperature and humidity, monitoring the light levels, and monitoring for biological pests. In the future it may be necessary also to monitor for atmospheric pollutants.

Temperature and humidity should be monitored through the use of electronic data loggers. These should be placed in predetermined locations though out the structures, and the locations should be noted on a floor plan. The key to a successful monitoring program is consistency. This includes consistency of recording unit placement, consistency of maintenance and down-loading of data from the recording units, and consistency in the interpretation of the data that is gathered. Data should be charted for each recording session, and data should be combined to provide an annual overview. Consistent monitoring, recording, and interpretation over an extended period will provide a very accurate look at these elements and how they affect both the structure and the collections.

Light levels should be monitored on a quarterly basis to establish a baseline for the data. A floor plan of the house should be used, and monitoring should be done at several points within each room. Again, consistency of the locations of the monitoring stations and the time of day monitoring is done will add to the validity of the data. In this way the curator will gain a better understanding of how the structure and the collections are affected by the changing sunlight patterns over the space of a year. This method will also keep track of the effectiveness of filters, drapes, and curtains that have been installed. As with the temperature and humidity monitoring, the data concerning light levels should be reviewed annually, and maintained on file as baseline data for future conservation and preservation efforts.

Biological pests should be monitored through both observation and trap lines. The most common biological pests are insects, and various members of the insect class are known threats to collections of organic materials (wood, cloth, paper, animal products). Mice are probably the most common vertebrate pest, but pack rats, squirrels, and even larger animals such as raccoons can also impact collections.

Trap lines for insects and mice should be set and recorded on a regular basis. Sticky traps for insects may be set and left for long term, with the only action necessary being a monthly change of the traps and recording the catch. Rodent trap lines must be checked every day, as a dead mouse or rat quickly decays and becomes an attractant for other pests, as well as a health risk to staff and visitors. A fairly intensive rodent trap line should be run for several weeks each fall about the time of the first cool weather, as it is the time when field mice are actively looking for winter harbor.

The floor plan mapping system should be used with both insect and rodent traps, and consistency in trap placement and recording trap results is necessary. An annual review of trap line catch per area of the house is necessary to document pest activity over the long term, as the appearance of certain types of pests may signal developing problems with the structure or the collections. This information will also be useful in the development of an Integrated Pest Management Plan for the park.

The results from the monitoring efforts discussed above will also be very useful to the next part of the preservation/conservation program, which is that of evaluation. The first step in the evaluation process is recognition of the different types of objects present in the collections. Obviously the temperature, humidity, and pest control measures are going to be different for ceramics, stone, and glass than they will be for wooden furniture, textiles in clothing, and paper in books and records. An inventory / appraisal done at the time the site was turned over to the NPS is fairly complete, and the MMA has a working catalog that supports and augments that appraisal. From this basic information the park curator is able to determine what percentages of the collection fit into the various object types (such as furniture, textiles, fine arts, photographs, ceramics). This

information in turn suggests what types of conservation and condition appraisals need to be made.

The next step is arranging for qualified conservators and/or preservation management specialists to inspect the collections in their specific area of expertise, and provide a series of collection condition assessments. These may be NPS employees or conservators in private practice. Whatever the source, the conservators should be recognized members of the profession (membership in the American Institute of Conservation) and graduates from a recognized conservation program. The reports from these specialists must follow the outline provided by the *NPS Museum Handbook*. Where private conservators are used, these reports should also contain estimates for any suggested treatments. Each report should prioritize individual object condition and treatment, and provide suggestions for general collections management care and preservation.

While it is the obligation of the conservator to determine and suggest the most urgent care required, it is the obligation of the curator to determine the necessity of any given treatment in the conservator's priority. The conservator is only looking at each object's condition. The curator must weigh the individual value each item has to the collection as a whole (associative, intrinsic, monetary, and so on) in order to develop a workable conservation treatment plan for the collections.

Visiting conservators and preservation specialists may also be used to suggest what types of preventive maintenance may be done on select collection material, and may also provide hands-on instructions for this maintenance to staff and volunteers. Some examples of these types of treatments might be the cleaning and application of protective coatings to metal objects, or the waxing of wooden furniture.

All of the information resulting from the above monitoring activities, conservation assessments, and on-site instruction by the visiting specialists should logically lead to the development of a Preventive Maintenance Plan for the park collections. This particular plan is often referred to as a Housekeeping Plan; however, that title is inadequate to the actual scope, content, and importance of this planning effort and resulting activities.

Developed by a conservator or senior curator, the Collections Preventive Maintenance Plan uses the data developed from monitoring temperature, humidity, light levels and pest activity and combines it with the information resulting from the various conservation assessments. The result should be a proactive schedule for preventive maintenance of the park collections. This plan will either codify the monitoring efforts or suggest improvements; set a schedule and methodology for cleaning and treatment of specific items (or classes of objects); and set a schedule for periodic return visits for conservators and preservation specialists to review the overall condition of the collections.

The long-term monitoring efforts will make the conservation assessments and development of the Preventive Maintenance Plan more efficient, but they are not strictly necessary to the successful completion of these programs. The unit should begin these monitoring efforts immediately, and continue them into the future as an ongoing effort to provide the best quality care possible for this park-specific resource.

None of these efforts will be possible without staffing and funding. Appendix A of this plan provides a workload analysis which can be used to record the staff time necessary for the monitoring and preservation management activities outlined in this section. These figures for preservation activities should be combined with the other collections management staffing needs and used to document the necessary staff time necessary to administer the collections at this unit.

Funding to support collections management can come from several different sources. This may include Operations Formulations System (OFS) requests to fill staffing needs and provide a base increase to the overall park budget to meet resource management needs. The Cultural Resource Preservation Program (CRPP) may be used to fund certain select projects not covered under either the Backlog Catalog (BAC-CAT) or Museum Protection & Preservation Program (MCPPP)—notably conservation treatments required by collections or individual objects. BAC-CAT funding may now be used to address any backlog of uncataloged material. The MCPPP fund is intended to specifically address items that appear as deficiencies on the automated checklist, and may be

used for such things as monitoring equipment (data loggers, light meters), conservation surveys, and preventive maintenance plans for the collections.

Unfortunately there is no specific NPS funding source that may be used to fund the staff time necessary to establish the monitoring programs. There are some granting programs (federal, state, and private) that may be open to application from the partner McLoughlin Memorial Association (such as the grant program run by the Oregon Tourism Bureau). These need to be well researched prior to application, however, as some of these funds can be fairly expensive in terms of the time spent in application, administration, and reporting requirements.

Recommendations

- Establish baseline data for existing environmental conditions by creating programs monitoring and recording light levels, temperature, humidity, and biological infestations.
- Graph or chart results from monitoring on a quarterly basis and consolidate the results annually.
- Secure the necessary conservation surveys and reports by NPS detail or private source contracts and have them include projected treatment reports and costs where possible.
- Schedule a preventive maintenance plan for the museum collections using data from the above recommendations as soon as possible.
- Use the workload analysis form in Appendix A of this plan to record and document required preservation activities, combine with other collections management activities, and request OFS funding to cover the staffing shortfall.
- Prepare innovative requests aimed at CRPP, BAC-CAT, MCPPP, and Cultural Cyclic programs to address collections preservation needs.
- Continue to explore innovative solutions for sharing staff time to address collections preservation needs.
- Pursue other non-Service funding sources through partner organizations.

Issue C— Protection



Figure 7 Exhibit case, McLoughlin House



Figure 8 Children's room, McLoughlin House

Issue D—

Collections Use

Issue Statement

Development and implementation of an integrated museum educational program will emphasize interpretive goals while ensuring collections preservation.

Background

Prior to the National Park Service's acquisition of the McLoughlin House site, the McLoughlin Memorial Association maintained a long tradition of providing visitor services and public educational programs. Since the site was added to Fort Vancouver National Historic Site, the National Park Service has been working with the MMA to provide interpretive services to the public while taking steps to ensure the McLoughlin House, the Barclay House, and the significant museum collection are preserved.

Currently the McLoughlin House contains furnished period rooms as well as exhibit cases containing historic objects representing Native Americans and the founding members of the MMA, Dr. Barclay's medical practice, and memorabilia of McLoughlin family members. Many original photographs and documents are also on exhibit. Some of these documents are "transferring" their image to the picture frame glass.

Discussion

Interpretive programs at the site consist of interpretive talks, uniformed and costumed interpreters presenting guided and unguided tours of the McLoughlin House, cultural demonstrations, living history programs, and special events. These programs are presented by NPS staff, volunteers from the local community, and MMA members. Since NPS acquisition in 2003, McLoughlin House interpretation and programs have been modified to meet NPS requirements. An evaluation of how the McLoughlin and Barclay Houses are being interpreted should be undertaken, and an

amendment addressing the McLoughlin House unit should be added to the park's existing Long Range Interpretive Plan from 2004. The recently completed General Management Plan and Environmental Assessment provide guidance on basic interpretive themes for the site. The current interpretive programs should be evaluated and realigned to reflect these identified themes. When evaluating the McLoughlin House, consideration should be given to the final appearance and arrangements of the furnishings. Many furnished historic houses appear sterile.

A very effective historic house presentation uses a "lived in look." This technique adds life and character to the house and greatly enhances the visitors' understanding of the home's occupants rather than being a static room filled with objects that encourage a "furniture tour" instead of a glimpse into the life of the people who lived there. A common mistake made in historic house museums is the level of tidiness and order in the rooms where no articles of clothing are left out and all the dolls and toys in a child's bedroom are strategically placed facing the visitor.

Some current inconsistencies in the arrangement of furnishings and the appropriateness of certain objects and how they relate to the interpretive themes should be addressed. The FOVA General Management Plan and Environmental Assessment indicate that the McLoughlin House will be interpreted to the 1846 to 1867 time period. To meet this goal the furnishings in the house should be evaluated to ensure they are all historically representative of the period.

Until the Historic Structures Report and Historic Furnishing Report are completed and additional information on furnishings is available, incremental steps may be taken to address some inaccuracies and to enhance the visitor experience. For example, a man of Dr. McLoughlin's stature and standing in the community during this time period would not have had animal skin rugs on the floor as now seen in the doctor's bedroom and the guest bedroom. Changes may also be made in how the rooms are furnished and what the furnishings represent. Another example is the desk and card tables currently in the dining room; they would not have been placed there but in the parlor.

As these changes are taking place, consideration should be given to the preservation and conservation needs of the historical furnishings. Issue B discusses maintaining a safe environment for the objects. This would include removing all original photographs and documents on exhibit, making quality reproductions for exhibit, and moving the original images to storage. Many historic textiles have been on exhibit for a long time. Where possible, these objects should be removed from exhibit and others used in their place. This increases their life and gives an opportunity for other objects to be exhibited.

Interpretive activities have a long and historic association with the site, and it is important for park managers to develop a plan that ensures protection of museum objects and other resources while providing for such activities to continue at the site. Interpretive programming should not be presented in the furnished rooms. Doing so sends a mixed message to the visitor and subjects the historic furnishings to significant risk of damage. The entry and upstairs hallways of the McLoughlin House, if cleared of exhibits and correctly refurnished with reproductions, could provide adequate space for interpretive programming without impacting the furnished rooms. All interpretive programs should consider the interpretive objectives while ensuring the protection of the furnishings.

Consideration should also be given to both staff and visitor safety. Compliance with life safety codes is of paramount importance. Issue C of this plan addresses the need for improved fire and security protection and the steps necessary to ensure all functions at the site meet life safety codes.

In the McLoughlin House, the use of both furnished period rooms and exhibit cases filled with objects are confusing to the visitor as the interpretive message shifts between the furnished rooms reflecting a lifestyle to an item by item presentation of curiosities. One step to enhance the visitor experience would be to remove the exhibits from the McLoughlin House and relocate them to the Barclay House. Loaned objects should also be returned, which would allow for rearrangement of furnishings in the McLoughlin House to more historically accurate locations and appearance.

A revised use plan for the Barclay House would have to be prepared to accommodate the added McLoughlin house exhibits. Site interpretation would be greatly improved with these suggested changes. In the Barclay House this move would enhance the story of the relationship between McLoughlin and Barclay. The move would also allow for telling the significant story of the roles of Eva Emery Dye and the MMA in preserving and managing the site since 1909. Exhibits could also be developed to interpret the historic objects from the McLoughlin and Barclay families, the important Native American objects in the collection, and other subjects relevant to the site and themes.

Encouraging research by providing appropriate space is a viable extension of the educational value of the site. The collections of historical objects, photographs and documents, and the Association archives are untapped resources that could provide additional insight into the lifestyle of both Doctor McLoughlin and Doctor Barclay. Documenting one of the earliest preservation organizations in the West, the properly organized and documented Association archives would be a treasure trove of information on historic site administration and resource management.

Other media may be developed to supplement and support the on-site interpretation. Using the newer technologies such as internet web exhibits, video programs, and audio tours using cell phones could greatly enhance the visitor experience. Developing publications such as site-specific catalogs, brochures, site bulletins, and pamphlets are also excellent ways to present additional and supplemental information.

Recommendations

- Return loaned items.
- Evaluate furnishings in the McLoughlin House to determine relevance and importance to interpretive themes.
- Rearrange furnished rooms in the McLoughlin House to interpret themes and to provide an accurate reflection of life in the 1846 to 1867 timeframe.
- Rotate select textiles and objects from exhibit to storage.

- Replace original photographs and documents on exhibit with quality reproductions.
- Develop guidelines and protocols for interpretation at the site.
- Ensure that all programs at the site are in compliance with applicable life safety codes.
- Develop a revised use plan for the Barclay House to allocate space for didactic exhibits.
- Develop exhibits for the Barclay House to support interpretive themes.
- Explore new technologies for use in interpretation.
- Develop space for use by researchers.



Figure 9 Bedroom with bear rug, McLoughlin House



Figure 10 Upstairs hallway, McLoughlin House

Issue E—

Staffing, Planning, and Program Development

Issue Statement

Management of unit museum operations requires professional staff with the training and experience to create and implement essential plans and programs.

Background

The McLoughlin Memorial Association was established in 1909 to move, preserve, and present the history of the McLoughlin and Barclay homes and the impact of the occupants upon the early developmental history of the Pacific Northwest. In doing so, the Association became the earliest historic preservation organization in the western United States, which in itself had a profound and lasting effect upon the development of the historic preservation movement in both Oregon and Washington.

The McLoughlin home was moved from its original location in order to prevent demolition in 1909, to its current site on the bluff overlooking Oregon City. The selected location had earlier been donated by James McLoughlin to the state of Oregon to serve as a combination park and pioneer memorial. The movement of the Barclay house followed in 1937. Collections, mostly original and period furnishings along with personal possessions of the two families, were added and together the two homes functioned to tell the personal stories of these two families and their impact upon the early history of the area.

The historic importance of the site and the continuing efforts of the Association to preserve and maintain it were recognized in 1941, with the official designation of the McLoughlin Home as a National Historic Site. Following the designation of Fort Vancouver National Historic Site as a unit of the National Park Service in 1961, McLoughlin National Historic

Site became an affiliated area under the continued management of the McLoughlin Memorial Association.

By 2000 the rising costs of staff and the preservation of two historic structures required the Association to petition local state and federal legislators to include the McLoughlin site as a unit of Fort Vancouver National Historic Site. This was accomplished in 2003; however, no additional funds or staffing was authorized to complete the transition and administer the unit. Instead, these funds were made up out of current operating expenses of the McLoughlin Memorial Association, Fort Vancouver National Historic Site, and the Pacific West Region.

Discussion

As an agency of the federal government, the National Park Service is required to follow the public laws affecting the management of federal properties, as well as to follow the policies, procedures, and guidelines promulgated by the Department of the Interior and the NPS. To those not used to working within this framework, this plethora of planning and operational regulation often appears burdensome. However, this framework of requirements protects service properties and resources from random actions that may be detrimental over the long term to good preservation and management practices.

Good planning starts with the gathering of basic data concerning the resource under consideration—in this case, the site, the houses, and their contents. These constitute the “resources” of this particular site, so the same care must attend their use and management that attends the preservation of big trees at Sequoia and desert big horn sheep at Death Valley. Actually, probably more care needs to be exercised when managing documented cultural material, as it is incapable of reproduction like trees and animals; once damaged or destroyed, documented cultural material can not be replaced. Good planning is always mandatory when dealing with cultural materials.

In the case of historic structures and furnishings, the necessary data to be gathered becomes part of planning documents such as the Cultural

Landscape Report (CLR), the Historic Structures Report (HSR), including a structural analysis of the historic buildings, and the Historic Furnishings Report (HFR). All of these efforts first document how the site looked, the condition of the historic structures, and how they looked at various times in their history. They then address how the structures and furnished areas should look when rehabilitation and refurnishing are completed.

Only when these basic management plans (such as the CLR and the HSR) have been completed is it possible to create fully developed implementation plans such as the Scope of Collection Statement (SOCS) and an amendment to the Long Range Interpretive Plan (LRIP), because so much of the latter depends upon the information contained in the former. Lack of the basic management plans should not prevent the park from drafting interim implementation plans (such as the SOCS and an amendment to the LRIP), as these are necessary to guide and support ongoing daily activities. However, lack of the basic management plans should prevent the park from making any physical changes in the site or structure until these plans are completed and implemented.

For the McLoughlin House unit, the CLR, HSR, and HFR have been programmed and scheduled for funding starting in FY-2008 and continuing through FY-2011. A draft, or interim, SOCS is in effect. There currently is no draft LRIP, and site interpretation is dependent upon the general themes as stated in the GMP/Environmental Assessment. This planning team is of the opinion that an interim LRIP needs to be drafted to provide more targeted direction to the interpretive programs for this site.

The site collections were appraised in 2002, just prior to the property being turned over to the National Park Service. While this appraisal provided a working basis for evaluating the collections at that time, it is incomplete and inadequate in a number of key aspects. A new appraisal in acceptable format and detail needs to be done in the near future, as this would support the HFR efforts as well as the on-going collection documentation and catalog work by park staff.

The need for a series of Conservation Assessments, a Collections Preventive Maintenance Plan, and an Integrated Pest Management Plan for

the museum collections have all been programmed for funding in FY-2008. These plans have been fully discussed in Issue B of this plan, and will be discussed further in this issue.

The need for a Security Survey, a Fire Protection Survey and an Emergency Operations Plan for the site are fully covered in Issue C of this plan, and will not be discussed here.

Unit-level planning efforts that protect unit resources and promote benign public use of those resources include access and use policies and procedures, unit standard operating procedures, special park use procedures, and a series of surveys aimed at evaluating the needs and effectiveness of the educational and interpretive programs. These procedures should be reviewed in place and incremental improvements made as required. Several references regarding visitor surveys will be sent to the unit curator for consideration.

While some of the above mentioned planning efforts will be accompanied by funding necessary to complete them, others will have to be performed by park staff using park resources. As mentioned in the Background statement, the McLoughlin site was added as a unit to Fort Vancouver National Historic Site with no provisions for additional staffing and funding. Supporting this site in terms of both staff time and operational funding is going to continue to be a challenge in the foreseeable future. The site has already been fairly successful in programming planning funds for the next five years, and there is reason to expect this success rate will be difficult to maintain in these times of fiscal constraints. Planning and programming for collections preservation funds has also been discussed in Issue B of this plan.

The need for adequate staff to manage the site and run the programs that are coming on line warrants further exploration. The park has documented the need for additional collections management staff in the current OFS request. This request should be augmented at the park's collections management program level by completion of the workload analysis in Appendix A of this plan. This is the same approach used very successfully by park maintenance programs over the years to document and support

their work in the park, but it has been underused by other park divisions. By clearly evaluating and documenting the needs for collections management time and funding, the curator will be automatically placing the program in a defensible, proactive position to receive staff and funding increases.

The park curator is already effectively using several inventive solutions to filling the staffing need. Staff time may be borrowed from other park and unit divisions where staff has the skills necessary to complete specific projects. At times, other parks will agree to detail staff for special projects as long as the benefiting park is able to pay travel expenses (the recent archival evaluation of the Association records is a good example of this).

Securing interns or students wishing to work on practicum exercises to complete specific projects is also a possibility, and here again the unit will probably be expected to pay at least travel-related costs. While any of these solutions may accomplish necessary tasks, none are particularly reliable in terms of the timely completion of required tasks, or completion of work in the order of importance or need. In addition, all come with the requirements of organization, training and supervision.

Recommendations

- Perform tasks and collect data necessary to support scheduled park planning efforts in the near future (Cultural Landscape Report, Historic Resource Study, Historic Furnishing Report, Conservation Survey).
- Complete collections inventory and contract for a new appraisal in the proper format and detail necessary to support planning activities and on-going collection documentation efforts.
- Finalize an interim Scope of Collection Statement for the site.
- Draft and finalize an amendment to the park's Long Range Interpretive Plan.
- Review site-specific standard operating procedures and incrementally adjust these as necessary to address specific site needs.

- Use the Workload Analysis forms in Appendix A of this plan to document all of the staffing and operational funding required by the collections management program at the McLoughlin unit.
- Aggressively pursue alternative funding and staffing opportunities as possibilities to fill both short- and long-term planning and program needs.

Appendix A—

Suggested Workload Analysis

This appendix provides an example of a system for analyzing a museum management program's work elements. By completing this chart the total staffing needs will be documented.

Core Work Elements	Current (Hours)	Current (FTE)	Needed (Hours)	Needed (FTE)	Non-Pers. \$
<i>Acquisition of Collections</i>					
Plan strategy for acquisition					
Identify sources of collections					
Survey for inclusion in park collections					
Appraisal and evaluation of proposed acquisitions					
Manage acquisition committee					
Manage park records					
Acquire rights and permission					
<i>Subtotal</i>					
<i>Documentation of collections</i>					
Accession new acquisitions within two (2) weeks					
Process archival collections including completion of ANCS+ catalog records					
Catalog museum objects					
Catalog library materials					

Photograph museum collections					
Maintain museum documentation					
Manage databases/knowledge systems					
Maintain documentation of treatment, use, etc.					
Maintain NAGPRA information					
Subtotal					
Preservation and protection of collections					
Maintain facility					
Provide for physical and operation security					
Ensure fire protection					
Monitor environment					
Monitor pests					
Ensure disaster preparedness					
Conduct housekeeping					
Ensure proper storage, including organization, equipment, and housing					
Conduct conservation program by assessing collection condition					
Treat items in need					
Subtotal					
Access and use of collections					
Provide for public and park access including reference services					

Develop and maintain exhibits					
Participate in curriculum-based education programs					
Conduct public program					
Produce publications					
Conduct research and obtain legal rights and permissions					
Loan collections for appropriate use by other institutions					
Develop and maintain internet/intranet access and website(s)					
Participate in NPS planning and compliance					
Conduct research					
Support appropriate reproduction of collections					
Subtotal					
Program administration and management					
Maintain up-to-date scope of collection statement					
Complete annual reporting: Collection Management Report; Annual Inventory; ANCS+ Database					
Manage annual budget					
Provide for future programming: PMIS and OFS					
Supervise paid and unpaid staff					
Develop and maintain up-to-date museum plans and policies					
Manage contracts					

Maintain information technology/management					
Provide administrative support					
Participate in park management and administrative issues					
<i>Subtotal</i>					
<i>Total</i>					

Appendix B—

SOP – Monthly Scheduling of Volunteers and Programs

STANDARD OPERATING PROCEDURE No. IVS-MCHO-2

MONTHLY SCHEDULING OF VOLUNTEERS AND PROGRAMS AT THE MCLOUGHLIN HOUSE UNIT

EFFECTIVE: 5 April 2006

The monthly operations schedule is the master schedule of the tours and staff for a particular month. It will include everything from the tours scheduled, special events, and the names of the staff working each day. We maintain a yearly calendar by month that is kept in the master schedule 3 ring binder, located on the top of the main desk in the office.

1. Creation of Monthly Schedule Calendar

- a. Download free calendar template from www.printablecalendar.ca - You may download up to two months beyond the current month. The templates save as Word files.
 - i. You should already have a year's worth of monthly calendar pages in the schedule book to be used to record future scheduled events. You also have the calendar on line so you can electronically fill in the tours and staff assignments.
- b. Open the appropriate Word file for the month you wish to update. Adjust format and column widths as desired.
- c. Transfer scheduled tours/events from handwritten calendar to template.

2. Procedures for establishing staff schedule

- a. Before setting up the staff schedule, look at the dates for the next month's tour calendar to see if tours have already been scheduled. Normally you need to have 2 docents plus the Ranger on site for "average" days. One docent is a full time employee of MMA (here Wednesday through Saturday). If a big tour has already been booked where extra docents will be required, be sure to keep that in mind when you are scheduling.
- b. Approximately two weeks prior to the end of the current month, send an e-mail to all currently active staff and volunteers requesting their availability for the upcoming month. Call people who do not have e-mail access.
 - i. Be sure to ask them to specify whether they are giving dates they CAN or they CANNOT work.

- ii. Give a specific date by which the schedules are due to you.
- c. Fill in the schedule for the hours that the houses are open, based on the availability provided by the staff and volunteers. Try to accommodate preferences for volunteers as much as possible.
 - i. Some people prefer 3-hour shifts, others prefer 6-hour shifts
 - ii. Some people prefer mornings vs. afternoons or vice versa
 - iii. Some people only work 1-2 shifts per month, others are willing to work more often
- d. When schedule is complete, save document and e-mail to staff and volunteers, with a copy to Kimm Fox-Middleton and the MMA President. Call people who do not have e-mail access or who may need an extra reminder to notify them of their scheduled shifts.
 - i. Print 3-4 extra copies that may be picked up by people who do not have e-mail access.
 - ii. Place a copy of the completed schedule in the desktop calendar, attaching it to the handwritten calendar and the staff/volunteer schedule notes

Greg Shine, Chief Ranger

Date

Appendix C—

SOP – Opening and Closing Procedures

STANDARD OPERATING PROCEDURE No. IVS-MCHO-1

OPENING AND CLOSING PROCEDURES AT THE MCLOUGHLIN HOUSE UNIT

EFFECTIVE: 5 April 2006

Opening Procedures: Barclay House

1. Unlock front door.
2. Disarm alarm. The procedure is to enter the code, then punch “enter” on the touch pad (contact your supervisor for the entry code).
3. Turn off outside light with switch to the left of the office door, turn on inside light to the right of the office door.
4. Open the office door, kitchen door, gift shop door.
5. Turn on lights in office & parlor (also turn on heat in parlor if needed).
6. Log on NPS computer.
7. Check for phone messages on both answering machines, take appropriate actions including logging these messages on the phone log.
8. Perform walk through safety inspection of building (both floors).
9. Review schedule for the day’s tours and volunteers.
10. Replace donation box top on stand (box kept at night in the kitchen in front of basement door).
11. Unlock downstairs bathroom – check for any needs, such as TP. Lock the “old lock” on the backdoor, to help keep the back door closed
12. Follow procedures for pest management (check SOP for directions)

13. Hang “Open” sign on sign post next to sidewalk. If alone in house, lock the Barclay House behind you.
14. Perform outside safety inspection of Barclay House and grounds while on way to McLoughlin House. Go behind the MCHO (cannon side) as well. Pick up any trash on grounds.

Opening Procedures: McLoughlin House

1. Unlock front door – walk in, lock the door behind you.
2. Disarm alarm (key pad in closet next to front door).
3. Walk through inside and do a quick safety inspection.
 - Upstairs
 - Lock all 4 gates to bedrooms.
 - Downstairs
 - Parlor – plug in electric candles (plug behind right leg of piano) if it is a dark day
 - South Bedroom (American) – open curtains and lock gate
 - North Bedroom (British) – lock gate (curtains already open)
 - Office – Open curtains and lock gate
 - Display Room – Open curtains, turn sign around to “Open” in window
 - Check to see that front door mat is properly placed.
4. Take the American flag (located on top of the display case) and run it up the outside flag pole if not rainy.
5. Upon leaving house, lock the front door.
6. If necessary, hang the directional sign (located on the display case top) on the screw on the outside of front door.
7. On return to the Barclay House, walk along the back side of the house and perform a quick visual safety inspection as well.

Closing Procedures: McLoughlin House

1. At 4:00 p.m., bring the flag in (and the sign on the front door), fold flag and put back on display case. Make sure you lock the front door behind you as you are in the house).
2. Upstairs
 - Unlock all gates, hang padlocks on latches only.

3. Downstairs
 - Parlor – unplug electric candles that are on top of piano and make sure bolts to inside door are secure
 - South Bedroom (British) – unlock gate, hang lock on latch, close curtains
 - North Bedroom – (American) – unlock gate, don't close curtains
 - Hallway
 - i. Make sure both Indian display case and front door are locked.
 - ii. Check to make sure doormat is correctly placed.
 - Dining Room – make sure velvet rope is back from the table
 - Office – unlock gate (uses different key from other gate locks), close curtains
 - Display Room
 - i. Turn “open” sign to “closed.”
 - ii. Make sure sign is to the left of the alarm company logo sticker and not blocking it.
 - iii. Close both sets of curtains.
 - iv. Double check the display case drawers to make sure they are locked.
4. Set the alarm and exit the building, locking the door behind you.
5. As leaving house, double check that the outside door is locked.

Closing Procedures: Barclay House

1. Bring in “open” sign off of sign post.
2. Back Parlor – check and lock outside bathroom door, and backdoor, turn down the heat, and the lights. Be sure that the doorknob is screwed securely into place.
3. Gift Shop – remove the top of the donation box, put on kitchen floor next to basement door, lock door.
4. Kitchen
 - Unplug or turn off any appliances that need to be, make sure porch and back doors are locked, as is the basement door and the door to the parlor.
 - Turn off kitchen lights.
5. Office
 - After reports are completed (including phoning in daily interpretive report to FOVA):
 - a. Log off computers.
 - b. Paperwork filed away.
 - c. Desk areas cleaned and organized.
 - d. Put fresh daily interpretive report on clip board.
 - e. Check schedule for following day.
 - f. Lock door to kitchen, turn off lights, and lock office door.

6. Front Hallway

- Lock office door.
- Turn on outside porch light.
- Turn off hallway light.
- Double check all doors to be sure locked.
- Make sure alarm reads “ready to arm” on panel next to front door.
- Set alarm.
- Walk out, pull front door behind you, and lock front door.
- **Double check to make sure door is locked.**

Greg Shine, Chief Ranger

Date

Appendix D—

SOP – Reservation Process for Scheduling Daily Tours

STANDARD OPERATING PROCEDURE No. IVS-MCHO-3

RESERVATION PROCESS FOR SCHEDULING DAILY TOURS AT THE MCLOUGHLIN HOUSE UNIT

EFFECTIVE: 5 April 2006

Application Form

- 1) All schools or groups must submit an application form to reserve a school or group tour.
- 2) To request and reserve a school or group tour, a prospective school or group must complete two steps:
 - a) Complete the McLoughlin House Tour Reservation Form (Attachment A).
 - b) Submit it to the McLoughlin House Unit at the address listed on the form for consideration.
- 3) Application forms will be available onsite during business hours.
- 4) When the new FOVA website is established, the form can be made available online
- 5) Upon request, park staff can mail, e-mail, or fax reservation forms to requesting parties.
- 6) Request not accompanied by a completed application form cannot be considered

Processing an Application Form

- 7) Upon receiving a completed application form, staff should check the *master calendar* (located on top of main desk) to confirm availability.
 - a) Please do not schedule any tours for Mondays, Tuesdays, any dates the site is not open to the public, or dates where staffing levels do not permit.
 - b) If the day and time is available, please add the tour to the calendar by recording
 - i) the name of the group.
 - ii) the contact person and their phone number.
 - iii) the number of participants.
 - iv) any special needs.

- c) If the day and time is not available, and another group has already scheduled an activity for the same day and time, then do not schedule it at the same time/date.
 - i) Contact the school or group and let them know there is a conflict.
 - ii) Attempt to identify an alternative day/time.
 - iii) Record any changes on the application form, being sure to initial them.

Notification of a Reservation

- 8) Upon successfully identifying a tour date and time, complete and mail out a confirmation letter, using the established format (Attachment B).
- 9) Be sure to include any additional information.

Surprises

- 10) Occasionally, you will have a group that arrives unannounced (even school groups have been known to show up this way)!
 - a) You will need to go over the basic rules that would have been covered in the confirmation letter if they had scheduled ahead of time.
 - b) If they have too many participants for the staff to manage, then suggest they divide their group into a couple of smaller groups and recommend that a group visit another local venue.
- 11) Occasionally, a group will not show up. In this case, please refer to the master calendar and phone the lead contact in an effort to find out if the group has been delayed or has cancelled without notifying the site.
- 12) Occasionally, a group may arrive at a different day or time than scheduled. In this case, do not panic.
 - a) Ask to speak to the group leader privately, away from any group pressures.
 - b) If you are able to accommodate the request, please do so.
 - c) If you are not able to accommodate the request, please
 - i) politely but firmly inform the group leader.
 - ii) suggest an alternative day or time.
 - iii) suggest an alternative local venue.
 - iv) compromise by providing a quick orientation talk or shortened program.

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